Introduction

This guide was created as a supplement for ServicePoint trainings. Users must enter data in the exact order specified below. This resource does not include every navigational mouse click.

Tech Support

Contact Baltimore County's HMIS Administrator, Jason Burns, for HMIS tech support, trainings, custom reports, assessments, etc. Emails are the preferred method of contact, and will produce much faster responses than voicemails. If your HMIS tech support phone call is not answered, Do NOT leave a voicemail. Submit an email, instead.

Email: jburns@baltimorecountymd.gov
Phone: 443-208-1020

HMIS Resources Web Address

Baltimore County's HMIS website contains current HMIS information, forms, guides, and data scores.
http://www.baltimorecountymd.gov/hmis

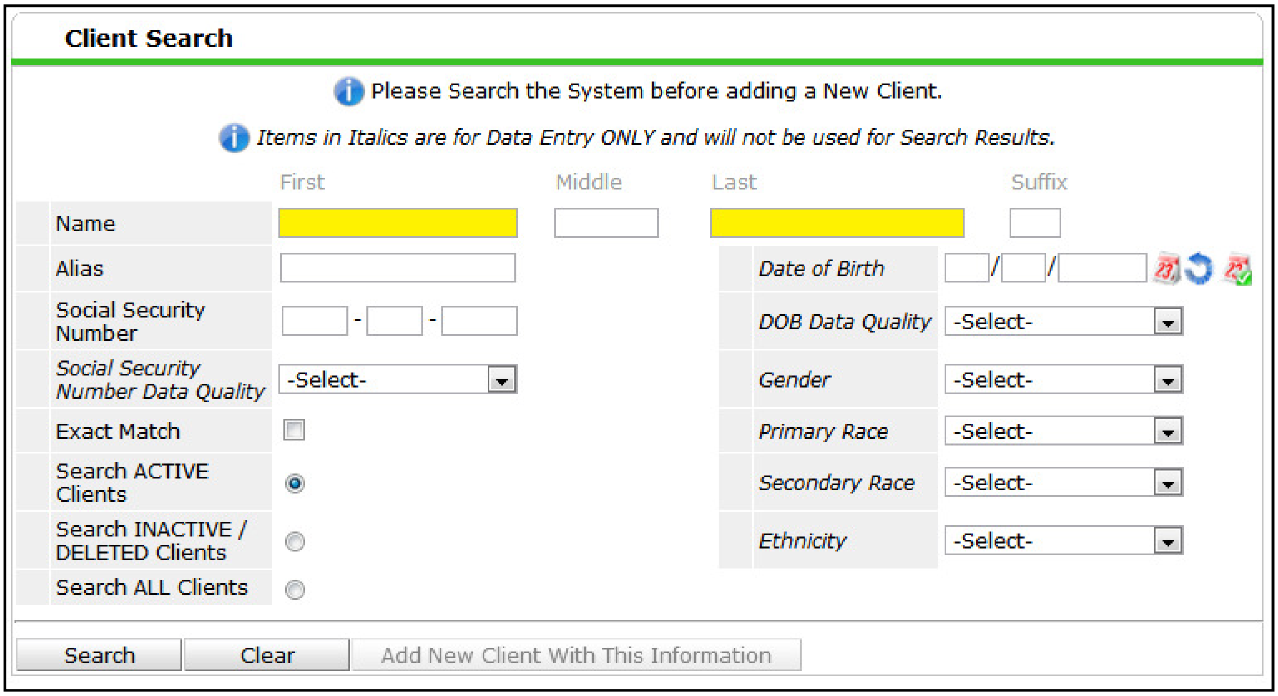
SP5 Login (Live Site) https://sp5.servicept.com/baltimoreco	**SP5 Login** (Training Site) https://sp5.servicept.com/baltimoreco_demo

MANDATORY DATA ENTRY ORDER:

1. SEARCH	SAME DATE	For those of you entering data for more than one provider, be sure you use the "**Enter Data As**" the correct provider.
2. ASSESSMENT	SAME DATE	If not entering data on the same day that you saw your client, you must "**Back Date**" before you complete your client's assessment.
3. HOUSEHOLD	SAME DATE	If your client is single & w/o children, skip this step, as SP5 will label your client as "Single." Do **NOT** create a "Single Household."
4. ROI	SAME DATE	Release of Information (ROI) = Consent Form. This step must be completed for every program, and is only valid for one year.
5. ENTRY DATE	SAME DATE	Record the date your client entered your program, and you **MUST** select the "**HUD**" entry type.
6. SVC TRANS	SAME DATE	Click on the "**Add Multiple Services**" button to record a single or multiple services.
7. EXIT DATE		**Update client assessment** on Exit screen, then accurately complete the "**Reason for Leaving**" and the "**Destination.**"

1. SEARCH

- Search for your client in ClientPoint to verify if your client is already in our database. Search by First and Last Name only. If no matches are found, complete the First Name, Last Name, SS#, and SS# Data Quality to create a new client.



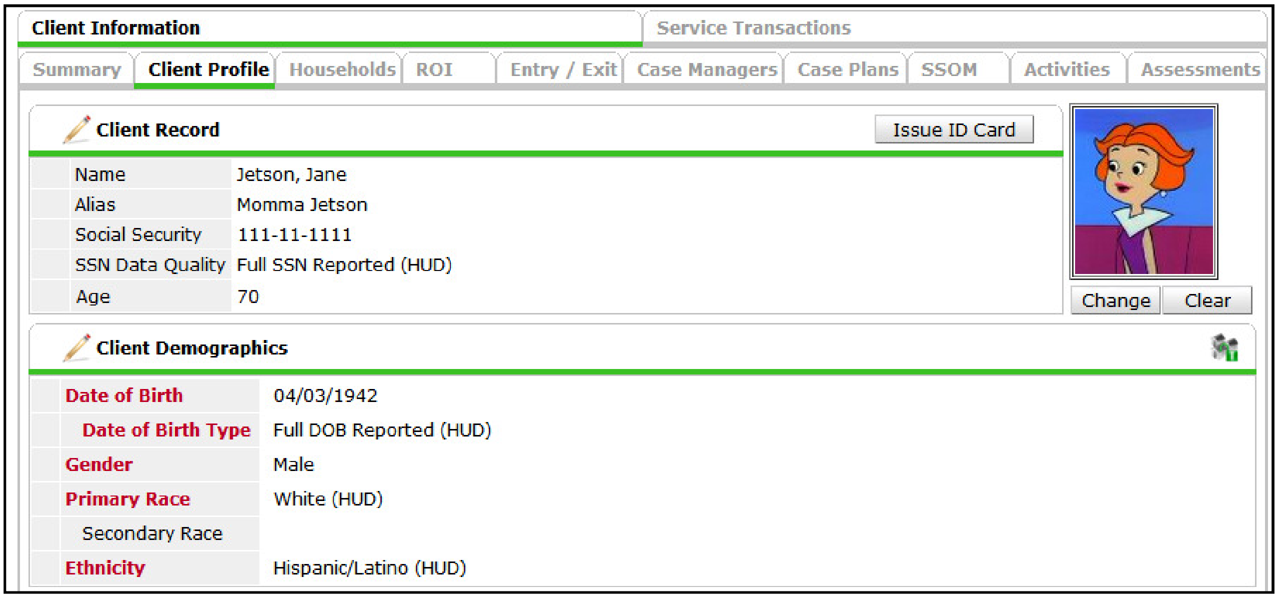
NOTES

ENTER DATA AS: For those of you entering data for more than one provider, be sure you are in the correct provider by clicking on "**Enter Data As**."

NICKNAMES & ALIASES: For clients that have nicknames/aliases or may be shortened/ extended, search **ALL** possibilities. For example, if your client's name is "Jim Smith," search for "Jim Smith," "Jimmy Smith," James Smith," etc.

UNIQUE NAMES: For clients that have a unique first and/or last name, search by only the first (or few) letter of the unique name. For example, if your client's name is "Jason Woohyunsung", search for "Jason W," "Jason Woo," etc.

2. ASSESSMENT (**Back Date** First, if entering on later date**)** - Once you are in Client Profile, accurately complete or update the assessment. If your client's assessment is already completed, you must verify and update! All of the questions in **BOLD RED** are required.



NOTES

BACK DATE: If you are not entering data on the same day that your client entered your program, go into "**Back Date**" mode before completing the assessment.

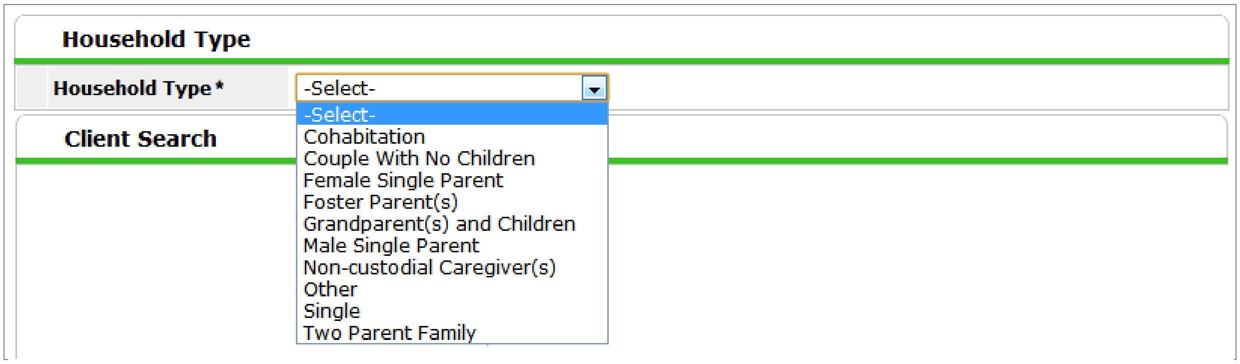
When using the date fields, do **NOT** change the time. Time fields are **NOT** relevant to reporting standards, and you may jeopardize data integrity. This applies to all date and time fields in SP5.

If you enter data for your client in"real time," or even eight hours later on the same day, you do **NOT** use "**Back Date**" mode. As long as you enter your data on the same day, "**Back Date**" mode is not needed. Remember, the time fields are **NOT** relevant.

PROGRAM PERFORMANCE: This is the 1st "snapshot" of your client. Most reports use this data, as well as the "snapshot" at Exit to determine your program performance and client progress. It's vital to ensure all data is accurate at both snapshots. Keys to accurate data include updating assessments at both Entry & Exit, as well as eliminating "Don't Know" or "Refused" responses. Sub assessments for Monthly Income, Non-Cash Benefits, and Disabilities must match yes/no questions.

REQUIRED QUESTIONS: All **BOLD RED** questions are required, including "pregnancy", "military", etc. SP5 will not allow you to continue to the next step if all required questions are not completed. If questions that are ***not*** in **BOLD RED** ***are*** relevant to your client, these questions must also be answered. For example, if your client is homeless, all of the homeless questions must be completed.

3. HOUSEHOLD INFORMATION – Create or modify in the Households tab, if applicable. **DO NOT COMPLETE THIS SECTION IF YOUR CLIENT IS SINGLE & WITHOUT CHILDREN!!!** SP5 automatically assumes your client is single if Households is not completed.



NOTES

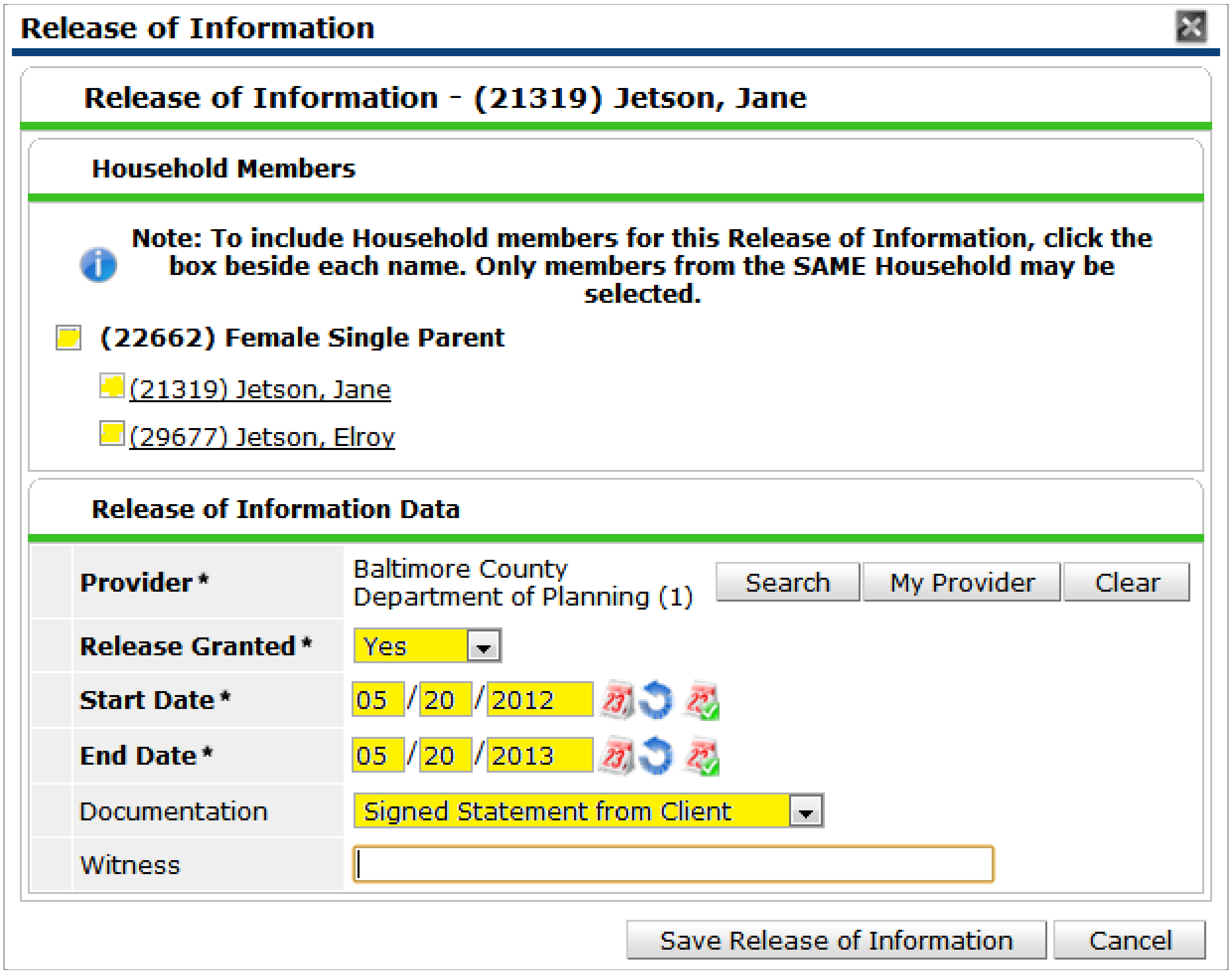
SINGLE CLIENTS (w/o Children): Do not create a "Single" household for single clients that do not have children.

ADDITIONAL HOUSEHOLD MEMBERS: It is now mandatory to collect required data for every household member that benefits from your service(s). Once you create/modify a household, you must complete/update the assessments for all household members before moving on to the next step.

MULTIPLE HOUSEHOLDS: Multiple households are becoming more common. SP5 has special features to create and modify multiple households.

For those clients where multiple households were accidentally created, please delete the incorrect household or contact your HMIS Admin, as false multiple households will jeopardize your data integrity.

4. ROI - Complete the ROI. ROI = Consent Form. You may complete the ROI for family members at the same time.

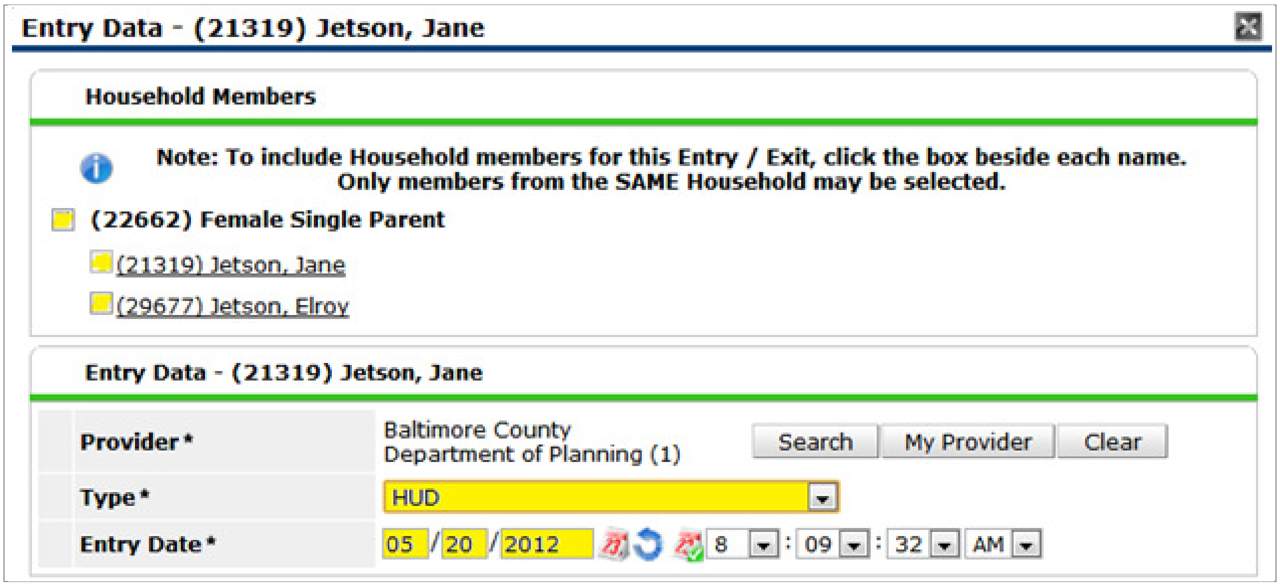


NOTES

MULTIPLE ROI's: Each program must have its' own consent form (county rule).

EXIPRATION: All consent forms are only valid for one year (county rule).

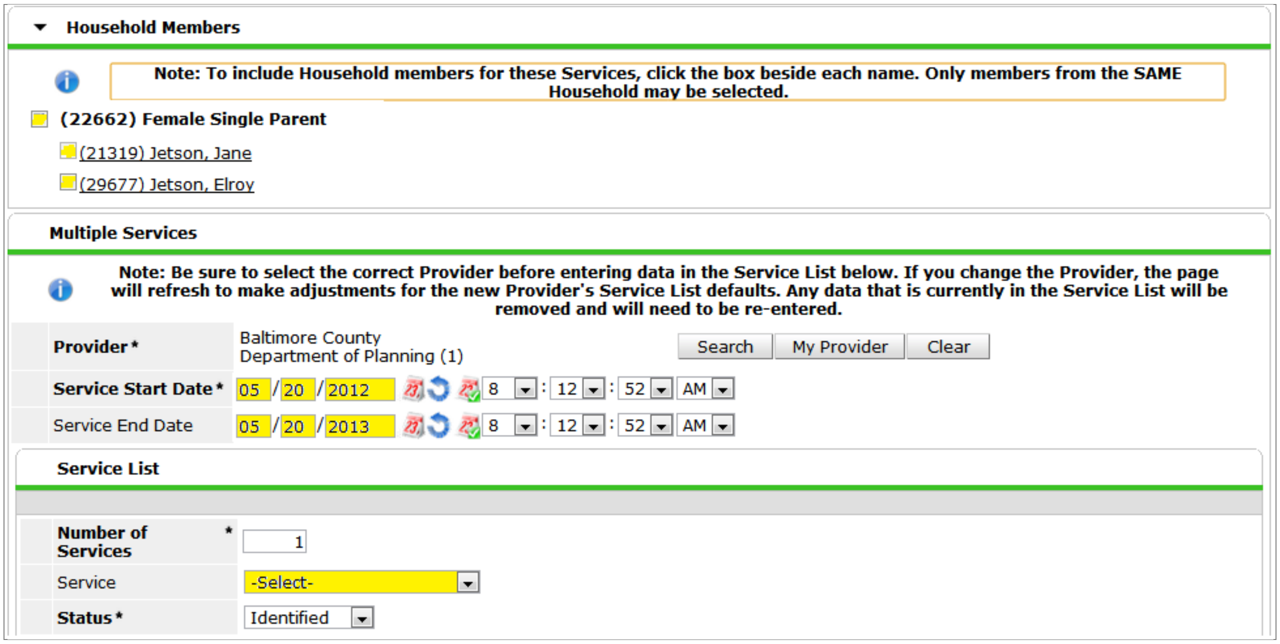
5. ENTRY Date - Add an Entry Date. You may complete the Entry Date for family members at the same time. The "Type" of Entry should always be "**HUD.**"



NOTES

TYPE: This is no longer a question with a defaulted response. You must select "**HUD**." If you select the wrong "Type", your data will not reflect on any reports.

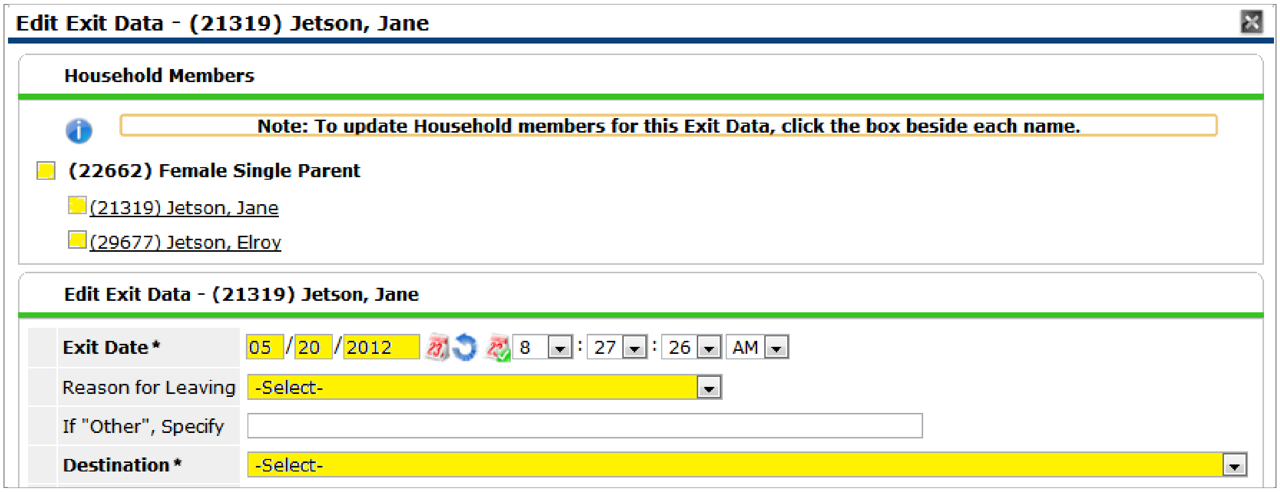
6. SERVICE TRANSACTIONS – Click on the "**Add Multiple Services**" button. You may complete the Service Transaction(s) for family members at the same time.



NOTES

MULTIPLE SERVICES BUTTON: You must click on the "**Add Multiple Services**" button before arriving at this screen, even if you are only adding one service transaction. If you click on other buttons, your data integrity will be jeopardized.

7. Exit Date (UPDATE ASSESSMENT ALSO) – Add an Exit Date. You may complete the Exit Date for family members at the same time.



Edit Exit Data - (21319) Jetson, Jane

Household Members

Note: To update Household members for this Exit Data, click the box beside each name.

(22662) Female Single Parent

(21319) Jetson, Jane

(29677) Jetson, Elroy

Edit Exit Data - (21319) Jetson, Jane

Exit Date *	05 / 20 / 2012 8 : 27 : 26 AM
Reason for Leaving	-Select-
If "Other", Specify	
Destination *	-Select-

NOTES

PROGRAM PERFORMANCE: This is the 2nd "snapshot" of your client. Be sure to accurately update your client's assessment on this Exit screen. Try to eliminate "Don't Know" or "Refused" responses. Sub assessments for Monthly Income, Non-Cash Benefits, and Disabilities must match yes/no questions! These client snapshots will be used to measure your program's performance. Most grantors/funders award the most points and/or funds to those programs where consistent client progress is evident.

REASON FOR LEAVING: If your client received a service(s) from your program that would qualify as program completion, be sure to select "**Completed Program**" for the Reason for Leaving. These responses will be used to measure your program's performance. Most grantors/funders award the most points and/or funds to those programs where the highest percentage of clients have "**Completed Program.**"

DESTINATION: Homeless programs need to accurately record client destination upon program Exit. Most grantors/funders award the most points and/or funds to those programs where the highest percentage of clients Exit to a "Permanent Destination."

Homeless Prevention programs need to accurately record client destination upon program Exit. Many of your clients may still reside at the same location from program Entry. Most grantors/funders award the most points and/or funds to those programs where the highest percentage of clients Exit to a "Permanent Destination."